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AUTHOR Busher, Hugh
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ABSTRACT

This document is a chapter in "The Principles and Practice of Educational Management," which aims to provide a systematic and analytical introduction to the study of educational management. The structure of the book reflects the main substantive areas of educational leadership and management, and most of the major themes are covered in the volume's 19 chapters, of which this is one. This chapter looks at the important mediational function of education leaders. Schools frequently must navigate between the external contexts and the internal processes when coping with externally imposed changes, and to bring about effective change, school leaders need to look at schools from the perspectives of their students. Since schools are socially constructed organizations made up of individuals, teachers and leaders must work with people and try to reconcile their conflicting perspectives. The strategy for implementing action can be expressed through a plan, which should be developed by consulting all the relevant staff and students, and if necessary, parents of the school. Leaders need to be especially sensitive to the professional development of teachers as they try to cope with changes. In any type of change, teachers' leadership is crucial to the plan's success. The types of knowledge and understanding that teachers require to be successful in the classroom are not only subject knowledge, but also social knowledge about the dynamics of students and student groups in their social contexts. School leaders can facilitate improvements in teaching and learning by helping teachers critically appraise their current teaching practices and explore how they can be improved. (Contains 69 references.) (RJM)

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Hugh Busher

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Managing Change to Improve Learning

Hugh Busher

Introduction

Change can be either imposed by external authorities or events or generated by the internal actors in a situation, although the final outcomes of a process of change usually reflect a negotiated compromise between the internal and external perspectives. When change is imposed too heavily by external agencies, internal actors tend to become demoralised. In England and Wales in the late twentieth century, Simkins et al. (1992) chronicled the impact of central government imposed curriculum change on schoolteachers. Helsby and McCulloch (1996) pointed out that these changes were alienating for teachers and support staff because it led to senses of disempowerment or loss of control. Busher and Saran (1995) discovered that many support staff were complaining about the extra duties these changes brought and the worsening of their conditions of service. Earley (1998) showed the extent to which these changes were focused through particular agents of central government, such as inspectors, and how stressful this was for staff in schools. Thrupp's work (1999) in New Zealand echoed this view, also showing how it had a deleterious effect on students' attitudes to learning in schools serving socially disadvantaged areas.

Leaders have an important mediational function for their school or college's members between the external contexts and the internal processes, helping staff colleagues and students to understand and cope with externally imposed changes (Busher et al., 2001). They need to perform this function effectively to avoid staff feeling disempowered and resistant to, or alienated from, the changes proposed by themselves or by external agencies. Glover et al. (1998), among others, refer to this as a bridging and brokering function. Middle leaders perform a similar function within a school or college, explaining and interpreting the views of senior staff or external agencies to their departmental colleagues, in part to try to avoid their colleagues and themselves being perceived as resistant or incompetent. They also put forward their departmental colleagues' views to senior staff to try to influence the strategic policy of their educational institution. Bradley and Roaf (1995) describe this function as advocacy.

However, as Grace (1995: 2) points out, 'there are paradoxes and contradictions in the constructs of school leadership currently held by different interest and ideological groups'. Work in Australia by Gronn (2000) shows that some of these contradictions can be addressed if leadership in schools is viewed and analysed as distributed throughout the staff and not just as an attribute of an elite: the senior staff. By implication, teachers should be considered as leaders, too, since that is their function with students, a stance argued by Wilkinson and Cave (1988) from their work in Northern Ireland.

Teacher-generated change arises out of the values and ideologies held by teachers and school leaders about the appropriateness of particular teaching, learning and pastoral care processes, practices and outcomes for educational organisations (Frost et al., 2000). These views are strongly influenced by school members' preferences for particular workplace cultures and particular teaching and learning practices in given subject areas. Siskin's (1994) research in the USA showed that the epistemological frameworks of different subjects have a considerable impact on what teachers construe as appropriate approaches to teaching and learning and to organising their subject departments.

This view resonates with that of Foucault (1980) in France, who explored how the power which socially constructed epistemological structures assert shapes social processes and individual people's identities in organisations. This implies that senior and middle leaders wanting to promote change, such as reflective action planning (Frost et al., 2000) by teachers, need to work with and understand teachers' own subject-based epistemological frameworks. It also implies that the appropriate parameters for evaluating teachers' work rigorously have to take account of the values and beliefs about teaching and learning embedded in the practices of each subject area, including special educational needs (SEN).

Contexts that interact with leaders' and teachers' strategies of change

Teaching and learning are social processes carried out in socio-political contexts. In order to understand more clearly how teachers and their leaders at middle and senior level can bring about changes in teaching and learning, it is important to be aware of the influence which various socio-political contexts have on education, constraining certain strategies of action and promoting others. These contexts can be summed up as national and local or regional government policy; the residential communities which schools and colleges serve; the organisational cultures which school and college leaders construct through their interactions with staff and students; and the views and values held by individual members of a school or college. The epistemological contexts of teachers' subject knowledge are considered in a separate section.

National and local government policies significantly affect not only the background values within which teachers have to work but their detailed

practices too. Taylor et al. (1997) pointed out how the policies of national and regional government in Australia represented an attempted enactment of particular values and ideologies, or belief systems, which affected how schools were organised. Gewirtz et al. (1995) argued that the emergence of market-oriented ideologies in education in England and Wales in the last quarter of the twentieth century altered understandings of appropriate relationships between leaders in and of schools and their staff colleagues, pupils, parents and governors. These policies are imposed on schools through central government agencies, such as the Office for Standards in Education (Ofsted) or the Qualifications and Curriculum Authority (QCA) in England and Wales, that organise centralised inspection systems or national tests. These materially affect how teachers teach and what changes to teaching they can make (Earley, 1998). In many countries, such as Turkey and Saudi Arabia, teachers have to use set textbooks which are prescribed by central government, and are given strong central guidance on the lessons they have to teach. Policy contexts at local or regional authority level affect how schools operate, the size of classes which teachers have to teach, which affects the teaching strategies they can use, and even whether schools stay open (Busher et al., 2001).

The residential communities that a school serves powerfully influence the culture within it as O'Connor (1997) indicated when reporting the attitudes of students from different ethnic backgrounds to schooling in the USA. Osler et al. (2000) note the impact of students' home and community backgrounds on the disciplinary frameworks which teachers and school leaders can construct and implement successfully. It emphasises the importance of inclusive education for all young people in education (Clark et al., 1999) and elaborates this into a series of school or college policies that stretch well beyond the management of the formal curriculum and the classroom. For example, it will influence the range of extra-curricular support activities teachers might choose to implement, such as breakfast clubs, homework clubs and classes, or outreach work for parents.

To bring about effective change, school leaders at senior and middle level and teachers need to look at schools from the perspectives of their students. Students in schools are often sharply and critically aware of the success of teachers' work (Rudduck et al., 1996) as a result of their lived experiences as people in complex socio-political circumstances of family, school and community (Howard and Gill, 2000). Wallace et al.'s (1997) work in the USA suggests involving students actively in the process of creating effective learning communities a view endorsed by Marsh (1997) in London, UK. Krechevsky and Stork (2000), in a study comparing successful teaching strategies in Italy and the USA, noticed the impact of local cultures on the quality of work which students produce.

What changes can be introduced to improve learning and how they are introduced are also influenced by an educational organisation's culture (Schein, 1992), and the sub-cultures within it of different formal and informal

groups of staff and students. These have a considerable influence on how teachers, students and school leaders relate to each other and work together (Ribbins, 1992). These cultures are expressed in the language, customs and rituals used by each group, be it a subject department in the formal organisation of a school or a group of disaffected students (Willis, 1977), and are an expression of that group's work-related and social identity. It incorporates how members perceive themselves, individually and collectively, and how they think they are perceived by other people inside and outside the school or college.

Leaders, teachers and students need to work together to create a positive culture towards learning that enacts particular values and practices that promote success and maintains social cohesion between all members of a school's staff and students (Hopkins et al., 1994). In Anglo-American and Australasian schools and colleges this culture is said to be collegial in nature. Such a culture sets high standards of performance, welcomes change, encourages risk-taking in pedagogy, and offers support to people developing their professional practice (Stoll and Fink, 1996). Work by Blase and Blase (1994), in the USA, established that leaders' trust encouraged teachers to be proactive in improving their teaching. However, Hargreaves (1994) argues that collegiality is often false or constrained by leaders holding effective power, whatever claims they make about consulting staff when taking decisions. These latter approaches to leadership and management tend to lead to staff becoming cynical about their degree of involvement in decision-making (Busher and Saran, 1992).

In bringing about change, teachers and school level and middle level leaders need to work with people as individuals, as well as working with groups of people. Schools and colleges are socially constructed organisations made up of individual members and external stakeholders, although the distinction between these two categories is blurred. Each has different personal perspectives, encompassing different values and beliefs, on how the organisation should be run (Greenfield and Ribbins, 1993) and how successful teaching and learning should be undertaken. These conflicting perspectives need to be reconciled if members and leaders of a school or college are to work together successfully. So, leadership is as much a moral undertaking (Hodgkinson, 1991) as a functional or technical exercise.

School or college leaders, then, have to help staff and students to balance the competing demands of their educational organisation and their work-related or professional needs and interests (Busher, 2001) in ways that are perceived as valuable to the individual people involved and to the school as an organisation (Busher, 1990). Interests are here considered to include aspects of teaching and learning – which topics people prefer to teach (or learn) and how to teach them; work-related social processes – which student groups teachers prefer to teach, which teachers students prefer to work with, or how

a subject area is managed; and social activities that people enjoy, be they extra-curricular clubs or sports, or out of school or college events. Leithwood et al. (1999) suggest that these conflicts can be resolved through helping people create personal goals that subsume them. To be effective for each person these goals have to be achievable but demanding; concrete and clear (e.g. beginning lessons effectively); and are short term but understood within a longer-term developmental context.

Adapting to changing understandings of knowledge

Leaders and other staff in schools and colleges work with students, and perhaps parents, too, to help them process and acquire knowledge. Teachers are members of particular knowledge or discourse communities, which are usually defined by the subjects they teach (Siskin, 1994) although Nias (1999) points out that primary school teachers often define their work-related identities in terms of the age-group of the students whom they teach. Middle and senior leaders in secondary schools often use such definitions to shape their roles as well as their work-related identities.

In these discourse communities (Foucault, 1980), knowledge is constantly changing, although the rate of change is variable. New knowledge takes many forms. First, it may concern the content knowledge of a subject area, perhaps derived from new research made public through subject association conferences or publications. Second, it might focus on pedagogy, considering the range of approaches available for teaching and learning a subject for different pupils and groups of pupils of different ages and abilities from different socio-economic backgrounds. Third, it may be about various aspects of the curriculum: syllabus construction, public examinations, assessment processes. Fourth, it might focus on government prescribed processes of regulation, inspection or staff appraisal that offer particular definitions of effective teaching. Fifth, it may result from changes in the resources available for the curriculum, in whatever medium they are published. For example, new information and communication technologies, because of the access to knowledge that they require and permit, offer the opportunity to alter the ways in which people teach and learn (Comber et al., 1998).

School and college leaders at various levels are the mediators of these epistemological horizons to their staff colleagues, as research in England (Busher et al., 2001) and in the USA has discovered (Siskin, 1994). Teachers mediate these same horizons to their students. Together, school staff and students have to weigh how new knowledge can be adapted and implemented to meet existing and preferred educational values, the resources and equipment available through the school or college, the skills held by the teachers and the learning needs of students. They also have to consider how to change existing practices to meet the demands of new knowledge frameworks, especially when these

are generated by powerful sources, such as central government changes to the curriculum. Such evaluation of practice, so long as it is under professional control, is said to be empowering of teachers and other staff, and likely to raise their morale, as they take responsibility for improving their own practice (Somekh, 2000). However, MacBeath (1999) suggests there is a need to achieve a balance between internal institutional evaluation and external inspection of practice to ensure rigour in teachers' evaluations of their practices as leaders, managers and instructors.

To develop classroom processes, teachers and their leaders have to collaborate in analysing rigorously how learning and teaching is currently carried out and to what extent it meets the needs of students (Frost et al., 2000). Evaluation can be carried out in many ways. The Office for Standards in Education (Ofsted, 1998) offered guidance on how schools can carry out self-evaluation of their work. Action-research encourages teachers to develop their own rigorous means of evaluating teaching, learning and management practices (Frost et al., 2000; Lomax and Parker, 1995). As a matter of professional practice, many teachers regularly if informally evaluate their lessons with specific students or groups of students. They are examples of the self-critical practitioners with whom Smyth (1991) worked in Australia, who theorise practice in common-sense language to discover ways of improving their students' learning opportunities. As Goodson pointed out: 'Whilst [teachers] may say that they are uninterested in research, nevertheless in their own lives and in their teaching they constantly reflect upon and refine their practice' (Goodson, 1997: 40).

Bringing about change

To bring about changes in teaching and learning, school and college leaders at all levels have to work with staff colleagues, students, parents and governors. Day et al. (2000) discuss the levers for change that are used successfully in the schools in their study. Successful change involves leaders not only understanding the functionalist or managerial aspects of leadership, but also the cultural and (micro) political aspects (Grace, 1995) and the contexts in which change takes place. Busher and Harris (1999) suggest that the arenas in which leaders need to operate can be summarised as:

- an awareness of context and the creation of professional networks
- bridge and brokering between different levels of authority
- using power to support particular educational values and ideologies
- creating social cohesion
- mentoring staff development.

In addition, middle leaders need to be perceived as modelling successful practice, if they are to have the respect of their staff colleagues and students

(Busher, 2001), since teaching is a practical activity as well as a managerial one. Wilkinson and Cave (1988), in Northern Ireland, explored the centrality to effective teaching of teachers being successful managers.

There are various ways in which the need for change can become visible. One of these is through rigorous evaluation of current practice, as has already been discussed. This is the exploratory step in an action research or action planning cycle (Frost et al., 2000). Writing in Hong Kong, Fung (1996) suggested that another means was through leaders raising awareness with staff and students that change is needed. Morrison (1998) perceives this as a form of force field analysis for deciding what are the pressures for and against change in particular directions. Work in Canada by Fullan (1992) suggests that only when people are engaged with the nature and shape of a problem can leaders and colleagues begin to initiate and implement changes. Somekh (2000) and Lomax and Parker (1995) describe this as noticing conflicts between preferred values and actual practices of teaching and learning (or managing) and consider that such analysis is an essential first step for teachers, albeit with the help and support of senior or middle leaders (Hutchinson, 1995), trying to devise more successful practices.

However, choosing to implement a particular course of action involves teachers making decisions about conflicting values and priorities as well as about opportunity costs (Busher et al., 2001). The use of resources – time and money, as well as more visible factors in schools such as books, materials, rooms and staff – for one student or group of students means that other uses of these resources have to be forgone, even if that is detrimental to the education of other students. Such decisions, then, are value laden (Simkins, 1997) rather than technicist, involving choices between competing sets of social and educational values and priorities. To resolve this, teachers and school leaders need to first develop and then project a coherent vision for action, as Gronn (1996) discovered in his work in Australia.

The strategy for implementing action can be expressed through a plan, the development of which involves consulting all the relevant staff and students and, if necessary, parents and governors of a school or college too. At a simple level, development plans involve leaders and their colleagues deciding how they are going to act, how they are going to implement action, and how they are going to monitor and evaluate the success of that implementation. Hopkins and MacGilchrist (1998) discuss how plans need to be broken down into manageable targets and these assigned as practical tasks to individual members of the team trying to implement change. In addition to planning how to act, and how to resource that action, the sequence and timing of the change process need to be located by critical path analysis: members of the team need to carry out particular tasks by particular times if the proposed change is to be implemented by a chosen time. The implementation of the changes needs to be monitored against predefined targets or indicators, including preferred and

underpinning social and educational values, to allow its success to be evaluated and to give guidance to what further and future actions need to be taken.

However, all leaders, whether of schools and colleges or of students in classrooms, encounter resistance, whether trying to implement change or maintain the status quo. Wolcott's (1977) research in the USA led him to describe this resistance as a continuum that ranged from disinterest in a project or lack of enthusiasm for it to open opposition to its implementation. Plant (1987) outlined a number of reasons why people resist change – fear, lack of confidence, lack of skill, particular beliefs – which leaders have to understand to help staff accommodate change.

To resolve conflicts of views between members of a school or college, for example, over the possible exclusion of a student, leaders have to try to negotiate a solution which benefits everybody if the change is to be implemented successfully (Bennett, 1995; Busher, 1990). Such negotiations illustrate clearly the processes of transactional leadership which complement those by which transformational leaders try to build cohesive cultures in work groups (Leithwood et al., 1999). More successful leaders seem to be those who are able to overcome resistance either through persuasion, or through assuaging people's fears, or through cajoling people to act in ways they prefer. These leaders are more astute politically and know how to apply a variety of strategies to the people and situations involved (Ball 1987; Busher, 2001). Altrichter and Salzgeber (2000) argue that such micro-political processes are the vehicle by which people in organisations create different types of consensus out of potential or actual conflict.

Helping teachers to cope with and instigate change

In order to bring about change, then, leaders need to help their colleagues and students to cope with change. A key means is through leaders promoting the professional development of their colleagues to meet the needs of their students better (Moyle et al., 1998). Hopkins et al. (1997) suggest that this can best be achieved through pedagogic partnerships: groups of teachers working together inside and outside the classroom to bring about improvements in teaching and learning. It may also involve middle leaders arguing with senior staff for adequate resources for staff development and training in their subject or pastoral areas, and allocating in-service opportunities equitably among their colleagues (Busher et al., 2001).

Middle leaders can approach this process of staff development in four different ways, Lomax (1990) argues:

- a research perspective, as an extended professional approach, which requires teachers to consider their practice in its policy, institutional and personal professional contexts

- a political perspective which defines staff development as a means to meet national and local policy agendas, regardless of the relevance of particular developments to improving learning
- a managerialist perspective which emphasises the importance of a school's corporate goals and needs with little regard for teachers' individual professional needs
- a restricted approach which focuses only on working in classrooms.

Only the first encourages staff to think critically about their work in order to improve it. The second and third options prioritise organisational needs (corporatism) over individual work-related needs, while the fourth is underpinned by a technicist perspective that tries to ignore the impact of contexts on teaching and learning processes.

For practitioners, whether teachers, subject leaders, senior staff or school or college governors, to reflect critically on practice in a rigorous manner requires help from other people, such as experienced colleagues, who can act as critical friends (Golby and Appleby, 1995). The Ofsted criteria for effective teaching (Ofsted, 1999) provide useful benchmarks for thinking about how teaching and learning can be developed effectively. Experienced colleagues can act as critical friends or mentors in a number of different ways. Moyles et al. (1998) suggested five key functions:

- professional supporter – who encourages and reassures their colleagues in their actions
- professional trainer – who coaches colleagues and helps them to clarify what situations need
- professional educator – to encourage colleagues to reflect critically on an evidence base of their actions
- professional assessor – to offer an evaluation of performance according to agreed criteria
- professional sponsor – able to help colleagues negotiate the organisational structures
- personal friend and counsellor.

In order to carry out many of these five aspects, mentors need to gain access to their colleagues' teaching rooms in order to observe, first, how their colleagues are teaching and, later, to monitor what changes are taking place as a result of mentoring work. This is an uncomfortable experience for many teachers, especially the first time they experience it. The fact that they are observed and their practice monitored on a daily if informal basis by dozens of students and any visiting classroom assistants and stray visitors to a school seems to make no difference. Hopkins et al. (1997) suggest some useful procedures to facilitate the process of classroom observation. These include leaders and colleagues defining the agenda for observation before observation

takes place, deciding how records will be made and kept, and agreeing how discussions will be conducted after a period of observation. It creates a negotiated and transparent framework within which people can work.

Dealing successfully with such sensitive work with staff and students requires middle and senior leaders to develop a variety of interpersonal and work-related skills. Moyles et al., (1998) suggested that these are

- flexible in their style of working with staff
- to use a wide range of interpersonal skills effectively
- effective communication
- sound professional practice
- sound professional knowledge involving a wide range of pedagogic and analytical skills
- negotiative and enabling skills
- fostering self-esteem
- patience.

The need for such careful support of teachers in their work in classrooms is succinctly summed up by Frost et al. (2000), who points out that school improvement can only be maintained if teachers' leadership of classroom-based innovation is sustained by more senior staff in a school.

Teachers as the leaders of learning

It is teachers who are the leaders of students in the classrooms, laboratories and workshops. The importance of teachers' leadership of learning is acknowledged in the career entry profile for newly qualified teachers in England and Wales (Teacher Training Agency, 1997: 18). It lists four main areas, three of which relate directly to core functions of leaders and managers:

- knowledge and understanding
- planning teaching and class management
- monitoring, assessment, recording and accountability
- other professional requirements.

Mortimore (1993) suggests that the types of knowledge and understanding that teachers require to be successful in the classroom are not only subject knowledge, but also social knowledge about the dynamics of students and student groups in their social contexts, psychological knowledge about how students learn and organisational knowledge about how to lead and manage lessons in their particular schools and colleges. The last encompasses an understanding by teachers of the micropolitical processes of their schools and colleges, so they are able to influence decision-making at subject area and

whole-school level and promote the interests of the students they teach (Ball, 1987; Busher, 2001), as well as an understanding of the social dynamics of the communities from which their students are drawn.

Like successful leaders at other levels in schools and colleges, teachers need to be able to project a vision that excites students and inspires their enthusiasm for a topic or activity, as well as planning carefully the learning opportunities that students are to experience in each lesson. To be successful, teachers need to be transformational and transactional leaders (Gunter et al., 2001) with their students. In drawing up lesson plans that establish a developmental sequence of topics and skills and draw on a variety of different resources and activities to maintain student engagement with the tasks, teachers need to take account of the various learning and social needs of each of the students they teach for each lesson. That alone is a mammoth task for a teacher in most schools in England and Wales, given classes that are often in excess of 30 students.

In addition, as the Teacher Training Agency (1997) suggests, successful teaching also involves teachers in effective monitoring of student performance, as well as of their own practice, to assess how best to help students develop their further learning. Although such monitoring can be carried out by observing and coaching students during times when they are undertaking individual or group work during a lesson, more formal reviews of learning also need to take place quite frequently. These can be carried out in a great many ways. Both formal and informal monitoring of students' work is carried out in order to explore how to develop students' better understanding of a topic and to avoid students becoming disaffected with lessons because they have misunderstood some of the work and so can no longer make sense of the topic being studied. For those students who are having particular difficulties with a subject, teachers might need to develop individual learning programmes that are monitored in discussion with students on a lesson by lesson basis.

At least as important as their leadership of the technical curriculum processes of students' learning, is teachers' leadership of students' social processes in classrooms and schools. This is not merely a matter of maintaining discipline and imposing school sanctioned rules of behaviour, but of creating social cohesion in each class so that students support each others' learning and reject behaviour that mitigates against that, as Marsh (1997) describes. Maintenance of effective discipline, then, is dependent on teachers building shared norms with their students, of whatever age, about what is acceptable behaviour that will positively sustain learning. Those same factors which are said to define effective and collegial cultures in schools and colleges also apply to their sub-units, the classrooms: a clear vision and programme for development by the teacher leader; care for students as individuals; trust between leaders and students; clear high expectations of behaviour and standards of work; support for risk-taking; appropriate support from the leader for students' work-related development.

It is no surprise then that the research of Wragg et al., (2000: 55) into incompetent teachers in England and Wales highlights what are, essentially, the qualities that might be expected of incompetent leaders and managers:

- low expectations of pupils
- not ensuring adequate pupil progress
- poor planning and preparation
- poor classroom discipline
- inability to respond to change
- poor relationships with pupils
- poor management of classroom resources
- inadequate monitoring and assessment of pupils' performance.

If change is to be brought about successfully in schools and colleges, it has to focus on the improvement of teaching and learning. The key people in such improvement are the teachers who lead and manage the student groups and the learning of the students, individually and in groups. This views students as the creators and constructors of learning, rather than as just the imbibers or consumers of it, and of their school or college as an organisation, under the leadership of their teachers as well as formally promoted leaders within the organisational framework of a school or college.

It is for school leaders at middle and senior level to facilitate improvements in teaching and learning by helping teachers to engage in a critical way with their current practice to explore how it can be improved, i.e. meet more successfully the needs of all the students in their institution. However, what changes can be brought about in any one school or college to improve learning will be strongly influenced by the socio-political contexts in which the institution is embedded. Thus, improving teaching and learning is a complex process that occurs through the interplay of internal and external forces in a school or college and the agency of individual staff and students engaged in it (Giddens, 1984). To be successful it requires the active engagement of staff and students in implementing preferred changes that enshrine individually and locally important values and beliefs while meeting nationally required goals and targets.

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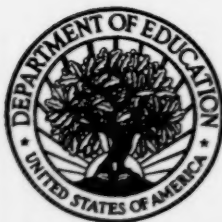
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